

DE EITC Campaign Volunteer Job Descriptions

Tax Preparer:

Tax Preparation: Responsible for preparing federal and state income tax returns as well as providing tax counseling to EITC Campaign clients regarding tax laws and credits, W-4 forms, and services available through the Campaign.

Requirements: No prior tax experience needed, but accounting and financial experience useful. Must have basic computer skills. Required to attend tax preparation training courses and receive IRS Certification. After training, must have a working knowledge and understanding of current tax laws and credits that impact low-income workers; ability to complete simple and multiple year tax return forms; strong verbal communication skills; and, must be a mature, responsible, and patient adult.

Site Assistant:

Intake and Flow Management: Responsible for greeting customers and directing them to sign-up sheet; checking clients W-2 form(s) to determine eligibility for EITC Campaign services; screening clients for proper documents; creating client folder according to Campaign standards; assisting clients with intake forms and providing clients with an overview of other services that are available to them. When appropriate, distribute and collect EITC Campaign surveys. Also, inform clients of other EITC Campaign sites and VITA locations when clients are turned away due to limited space and/or availability.

Administrative support: Duties include informing EITC Campaign clients when volunteers are available; crossing client names off the sign-up sheet once served; pulling necessary tax forms for clients; making copies; loading computer printers and copier with paper; changing toner on copier; and assisting with crowd control.

Quality Control: Responsible for sorting copies of completed tax returns in proper order for clients; obtaining required signatures on all necessary forms; verifying client information is correct on their return and administering the closing interview on the intake sheet.

Requirements: No prior tax experience is required in this key role. People skills, organizational skills, and a basic understanding of taxes are required.

Cash Coordinator:

Benefits & Savings: Responsible for working individually with customers to explain the benefits of saving by splitting the refund into several accounts, and helping customers determine their eligibility for state benefit programs, such as food stamps and state subsidized health insurance, using a computer-based interview tool and written materials. Open CDs for customers interested in saving their tax refund. Help customers to learn about the range of benefits and how much money they could save if they take advantage of them. Use the state's new web-based application system to assist customers with their benefits applications. Refer customers to additional financial education and savings opportunities as needed.

Credit Reports: Duties include explaining the importance of a good credit score; pulling a merged credit report; conducting a brief interpretation of the report; and referring customers to one of five partnering housing counseling agencies for in-depth credit counseling and/or credit repair.

Requirements: No prior tax, financial education, or credit counseling experience needed, but is useful. Computer skills are also helpful. Required to attend a financial education course. After training, must have a working knowledge and understanding of the purpose of saving (split refunds), benefits screening, and credit reports; ability to pull credit reports and navigate benefits screening web application; strong verbal communication skills; and, must be a mature, responsible, and patient adult.

Note: *Volunteers who do not wish to prepare taxes may be trained to do both the Site Assistant and Cash Coordinator jobs as these two jobs will work together.*